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Follow-up to the World Summit for Social Development and the twenty-fourth special session of the General Assembly: review of the relevant United Nations plans and programmes of action pertaining to the situation of social groups: modalities for review and appraisal of the Madrid International Plan of Action on Ageing

Modalities for the review and appraisal of the Madrid International Plan of Action on Ageing

Report of the Secretary-General

Summary

The present report reviews recent progress in defining the modalities for the review and appraisal of the Madrid International Plan of Action on Ageing. It suggests, for the consideration of the Commission for Social Development, possible arrangements for the first cycle of the review and appraisal at the national, regional and international levels.

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I. Introduction

1. In the Madrid International Plan of Action on Ageing, adopted by the Second World Assembly on Ageing in 2002, the World Assembly noted that systematic review of its implementation by Member States is essential for achieving success in improving the quality of life of older persons and requested that the modalities of review and appraisal should be decided as soon as possible. The General Assembly, in its resolution 57/167, invited the Commission for Social Development to consider those modalities at its forty-first session in 2003. Following the recommendations of the Commission for Social Development, the Economic and Social Council, in its resolution 2003/14, invited Governments, the United Nations system and civil society to participate in a "bottom-up" approach to the review and appraisal of the Plan, through, inter alia, data collection and the sharing of ideas and best practices.

2. In its resolution 42/1 on the modalities for review and appraisal of the Madrid Plan of Action, the Commission for Social Development, inter alia, encouraged Member States to establish or strengthen, as appropriate, national coordinating bodies or mechanisms to facilitate the implementation and dissemination of information about the Madrid Plan of Action, including its review and appraisal. The Commission also encouraged Member States to include both ageing-specific policies and ageing-mainstreaming efforts in their review and appraisal of the Madrid Plan of Action and in their national strategies, bearing in mind the importance of mainstreaming the issue of ageing into global agendas.

3. In the same resolution, the Commission decided to undertake the review and appraisal of the Madrid Plan of Action every five years and requested the Secretary-General to propose guidelines for the review and appraisal process, taking into account the views of Member States, civil society and the private sector, including a proposal for a specific theme emanating from the Madrid Plan of Action for the first review and appraisal cycle.

4. The Secretariat sent a note verbale, dated 14 June 2004, to the permanent missions of all Member and observer States to draw attention to Commission for Social Development resolution 42/1 and to request information regarding actions taken with regard to national coordinating bodies or mechanisms and to efforts to develop ageing-specific policies or to mainstream ageing in national strategies. In the note verbale, the Secretariat also sought the observations and suggestions of Member States regarding the guidelines for the review and appraisal process and proposals for a specific theme for the first review and appraisal cycle. Responses to the note verbale were received from twenty-seven Member States.

5. In its resolution 59/150, the General Assembly requested the Secretary-General to present his proposals for conducting the review and appraisal exercise at the regional and global levels to the Commission for Social Development at its forty-fourth session. The current report is prepared in compliance with the request of the General Assembly and is based on the views of Member States organizations, programmes and specialized agencies of the United Nations system and major international non-governmental organizations.

6. In addition, the Division for Social Policy and Development of the Department of Economic and Social Affairs of the Secretariat organized, together with the Economic Analysis Division of the United Nations Economic Commission for Europe, an interregional consultation on the review and appraisal of the Madrid Plan

of Action, which was held at the Palais des Nations of the United Nations Office at Geneva from 26 to 28 September 2005. Officials with responsibility for issues of ageing from each of the five regional commissions, officials from programmes and specialized agencies of the United Nations system and regional representatives participated in the consultation. They discussed ways and means to promote the bottom-up approach and contributed to the elaboration of regional modalities of the review and appraisal of the Madrid Plan of Action, including the calendar, content and format of the regional and global review and appraisal.

II. Review and appraisal of the Madrid Plan of Action at different levels

A. Bottom-up participatory approach

7. The bottom-up approach and the participation and flexibility it affords are the principal characteristics of the review and appraisal of the Madrid Plan of Action, which were elaborated by the Commission for Social Development. The bottom-up approach brings the monitoring, review and appraisal processes as close as possible to the national and even local level, where the majority of implementation efforts are taking place. The approach reflects and promotes a major tenet of the Madrid Plan of Action, which is to ensure that older persons are viewed as active members of their societies and that their participation in decision-making is facilitated. The participatory nature of the review and appraisal envisages the involvement of all major stakeholders in the process, thus promoting opportunities, in particular those for older persons, to realize their potential to participate fully in all aspects of life and, most importantly, in actions that are designed to specifically influence their well-being. The involvement of older persons in their communities is crucial for the bottom-up participatory assessment of governmental policy and programmes on ageing.

8. It is equally important that the review and appraisal be a flexible exercise, allowing for national and local experience and expertise to be utilized and relevant good practices identified and shared. In this context, pre-existing programmes and projects — both within and outside the issue of ageing — could be analysed in order to reveal and evaluate their participatory components. When planning how and where to implement bottom-up participatory approaches, Governments should define what constitutes participation and where it takes place. There are different degrees of participation, from merely being informed of what is happening to the actual empowerment of stakeholders through involvement in all stages of an activity. The methodology is important and it is vital to identify groups and organizations that are familiar with participatory approaches. Local and national research and university centres, and non-governmental and community-based organizations could be invited to participate and share their experience in participatory monitoring and assessment. The Madrid Plan of Action emphasized the valuable role of independent, impartial monitoring of progress in its implementation, which could be conducted by autonomous institutions. Important lessons could also be learned from participatory projects and programmes of the United Nations system and non-governmental organizations. The experience could be in areas besides ageing, including in the elaboration of participatory budgets or in

conducting participatory research in numerous areas of social development. It is therefore important that Governments take a broader look.

9. The bottom-up participatory approach does not aim to replace all other methods of monitoring, review and appraisal. Instead, it calls for their supplementation through a wider use of qualitative methods. While concrete methodology may vary, qualitative and participatory content should be strengthened and more fully utilized. In addition, the quantitative monitoring of social situations, such as through censuses, surveys and civil registration, can play a very important role by helping to identify local and national priorities on ageing for more targeted participatory inquiry.

10. The bottom-up participatory approach has advantages and limitations. Some of its major advantages include gathering information directly from older persons, the primary stakeholders in the implementation of the Madrid Plan of Action, discovering emerging issues quickly and giving regular feedback to stakeholders as a basis for making necessary adjustments to existing policies and programmes. The limitations of participatory assessment include the complexity of the process, the difficulties in assuring the continuing availability of core stakeholders originating from the same community, and the availability of sufficient expertise to analyse and process information. Other possible challenges include how to assure that the bottom-up review and appraisal is representative and its results are informative and valid for policy adjustment. Weighing the pros and cons of the bottom-up participatory approach is a daunting task. Meanwhile, it is the approach that directly responds to the participatory thrust of the Madrid Plan of Action, which promotes participation of older persons in decision-making processes at all levels.

11. The process of participatory review and appraisal is not intended to produce a mere checklist of whether or not Governments have implemented the Madrid Plan of Action. It should be a means for Governments and citizens to engage in dialogue in order to achieve a better understanding of the situation and needs of older persons and to promote implementation of the Madrid Plan of Action in areas that are truly important to people. The process should help Governments to assess policies and programmes and to share good experiences. It should not be simply a one-time activity for reporting to national authorities or international bodies. The bottom-up participatory approach should ideally represent an ongoing process of engagement and participation that will be incorporated into the implementation of the Madrid Plan of Action.

12. The bottom-up approach envisages the involvement of older persons as primary, or core, stakeholders and major players in conducting the review and appraisal. Paradoxically, for the bottom-up approach to be fully operational, it is essential for it to have a top-down component, which would support the participatory process of review and appraisal through organizational, promotional and financial measures. The process needs a catalyst and a facilitator. Government should be seen as the principal catalyst and end-user of policy-relevant information, involving, as necessary, facilitators with sufficient experience in conducting participatory research. In this regard, it is necessary to have an established national mechanism on ageing, which would have overall responsibility for the implementation, monitoring and appraisal of national action on ageing. The agendas of national implementation of the Madrid Plan of Action, on the one hand, and its review and appraisal, on the other, are compatible and mutually reinforcing. Success

of the national implementation of the Madrid Plan of Action depends to a large extent on the existence of a clear-cut national strategy to mainstream ageing issues into policy processes at the national level and the ability of various national ministries and institutions to coordinate actions to this effect, establish pertinent partnerships and secure funding, first of all budget allocations, to keep the focus on ageing. Based on the information that has been made available to the Secretariat, 25 Governments have established their national mechanisms on ageing. In some countries, organizations of older persons are represented in these mechanisms. **In this connection, the Commission may wish to request those Member States that have not done so to establish their national mechanisms for the implementation of the Madrid Plan of Action at the national level and inform the United Nations Secretariat accordingly, including by providing the contact details of the national mechanisms, in order to facilitate international cooperation and the exchange of information and good practices.**

13. Among its many functions, the national mechanism on ageing, whether a council, committee or similar body, will have important responsibilities for the review and appraisal exercise. Working with the relevant ministry or office, this body should define the scope of its activities and responsibilities, especially what to review and appraise. That involves identifying principal national priorities on ageing, relevant policies and programmes that were adopted vis-à-vis the recommendations of the Madrid Plan of Action, goals and targets established and resources allocated for their accomplishment by each stakeholder. Available statistical data could allow for a preliminary assessment of the local and national ageing situation and the identification of areas for more specific participatory inquiries. Another important step is to find out what participatory experience and traditional practices of participatory dialogue are available in the country and decide how they could be adapted to the specific objectives of the review and appraisal exercise. A major partner with experience in participatory research — a non-governmental organization, academia or a consultant group — could be invited to facilitate, but not direct, the participatory exercise, including gathering information, analysing it and presenting it in a policy-relevant format.

14. Based on the information that was made available to the Secretariat, several countries have undertaken measures to develop procedures for monitoring national activities towards the implementation of the Madrid Plan of Action. Often, these include regular monthly or quarterly meetings of the Government-led national coordinating entity in order to promote and facilitate review and appraisal through working with contributing agencies, including monitoring and coordinating the development and publication of periodic evaluation reports, engaging contributing agencies in the identification and dissemination of positive and replicable practices, promoting and facilitating the monitoring process through education and training of major stakeholders, including older persons, and reaching out to involve various segments of civil society in review and appraisal exercises.

B. Support for national action

15. The organizations, programmes and specialized agencies of the United Nations system can offer their expertise and practical experience in support of national efforts to implement, review and appraise the Madrid Plan of Action. The Department of Economic and Social Affairs prepared a framework for the

monitoring, review and appraisal of the Madrid Plan of Action that provides Member States with substantive background for the bottom-up participatory approach, describes and compares qualitative and quantitative methods of review and appraisal and proposes in its annex a set of indicators to assess progress made regarding the implementation of the Madrid Plan of Action. The framework and the chart of indicators are available online (www.un.org/esa/socdev/ageing). In addition, and in cooperation with the regional commissions and other interested organizations, the Department of Economic and Social Affairs is currently developing practical guidelines for the review and appraisal of the Madrid Plan of Action at the local and national levels, explaining the content and suggesting a methodology for the bottom-up participatory approach. The guidelines are meant to help national Governments with all stages of participatory and bottom-up processes of review and appraisal. Support for national action will take the form of a number of activities contemplated by the Department and the regional commissions. Provision of support is, for the most part, subject to the availability of extrabudgetary resources. In order to better assist Member States in their efforts to review and appraise implementation of the Madrid Plan of Action, including through advisory missions at the request of Governments, a funding proposal for the provision of technical cooperation by the Department of Economic and Social Affairs and other entities of the United Nations system organizations, including the regional commissions, will be prepared.

16. The Statistics Division of the Department of Economic and Social Affairs is updating the Principles and Recommendations for Population and Housing Censuses in preparation for the 2010 World Programme on Population and Housing Censuses. The updating process will include a review of the age and sex categories for the disaggregation of data on a wide range of demographic and social characteristics of the population. It is envisaged that, for many of the topics, given the increased concerns about population ageing, the upper age cut-off for tabulating the data will be raised to 100 years plus. Through a series of regional and global meetings in preparation for the 2010 round of population and housing censuses, the Division is planning to further emphasize the need to provide national numerical frameworks for review and appraisal of the Madrid Plan of Action.

17. The Economic and Social Commission for Asia and the Pacific has conducted two national workshops, in China and Sri Lanka, to test a bottom-up participatory approach for reviewing the impact of ageing-related policies in the field. In preparation for the workshops, the Commission developed a training manual on the appraisal modality, in which a comprehensive matrix of indicators was included. The proposed matrix was endorsed by participants at the regional seminar on follow-up to the Shanghai Implementation Strategy, which was conducted by the Commission in Macao, China, in October 2004, and five countries expressed an interest in utilizing the matrix for review and appraisal of the implementation of the Madrid Plan of Action and the Shanghai Implementation Strategy. At the request of the Government of China, the secretariat of the Commission organized a national follow-up expert seminar on ageing-related data collection in January 2005 to harmonize the national "indicator matrix" for the Madrid Plan of Action.

18. The Economic Commission for Latin America and the Caribbean has followed a subregional approach in its implementation and monitoring efforts by organizing expert seminars for countries in Central America (El Salvador, November 2004), the Caribbean (Trinidad and Tobago, November 2004) and South America (Buenos

Aires, November 2005). The Commission is also providing technical support to five countries of the Central American and Caribbean subregions (the Dominican Republic, El Salvador, Guatemala, Nicaragua and Panama) in the elaboration of national policies and programmes on ageing, taking into account the recommendations of the Madrid Plan of Action and encouraging the development of a participatory approach for policy and programmes.

19. The Economic and Social Commission for Western Asia works to promote awareness-raising and the participation of older persons and assists Member States, at their request, to develop and implement national action plans, including for review and appraisal. The Commission has received two requests for technical assistance in formulating national action plans on ageing.

20. The United Nations Population Fund (UNFPA) conducts participatory exercises at the country level for needs assessment and programme development. Such exercises are carried out by multidisciplinary teams that include representatives from the UNFPA office, Governments, non-governmental organizations and various stakeholders. In India, UNFPA conducted a 32-district needs assessment and plan of action in the Integrated Population and Development Project involving the Government, non-governmental organizations, health service providers and locally elected bodies as part of the process leading to the formulation of the sixth Government of India/UNFPA Country Programme 2003-2007. Similar exercises are carried out in other countries to identify a range of priority programme areas pertaining to adolescents, older persons, women's empowerment and emergency situations. The UNFPA regional office for Latin America and the Caribbean, through its country support team and with the collaboration of the Economic Commission for Latin America and the Caribbean, supported research on the participatory mechanisms for the design and implementation of laws, policies and programmes in Argentina, Brazil, Chile and Colombia. UNFPA will make available its expertise in conducting participatory research in various areas of population activities and continue to support the training of policymakers and programme planners. It will also support research activities, advocacy efforts to renew interest in population ageing, and ageing initiatives, including the work of non-governmental organizations in this area, and capacity-building. UNFPA is currently in the process of finalizing its guidance note on population ageing, which will encourage country offices to advocate for the mainstreaming of population ageing into national development frameworks and poverty reduction strategies, encourage the collection of country-level data disaggregated by age and sex and support the implementation of the Madrid Plan of Action and participation in its review and appraisal process.

21. The International Labour Organization (ILO) will contribute to the national monitoring, review and appraisal exercises by sharing its extensive knowledge base on employment and social protection statistics and qualitative information, such as on the application of labour standards. ILO will also share its long-standing experience in bringing together Governments and social partners — representatives of workers and employers — in order to reach constructive and balanced decisions.

22. Through various projects, the World Health Organization (WHO) is collecting experience in qualitative research methodologies on selected priority issues identified in the Madrid Plan of Action, particularly those related to primary health care and the provision of integrated health and social services for older people.

Subject to the availability of additional resources, WHO could provide, through its system of regional advisers on ageing and WHO country offices, technical assistance to interested Governments in reviewing the implementation of the Madrid Plan of Action on health-related issues.

23. Interesting and useful lessons could also be learned from non-governmental organizations in the area of ageing. For instance, HelpAge International offers numerous examples of participatory initiatives, including those with a monitoring component. An Older Citizens Monitoring Project is being implemented in Bangladesh, Bolivia, Jamaica, Kenya and the United Republic of Tanzania. The project aims at engaging older persons with relevant agencies, supporting local and national advocacy with and by older people, developing locally relevant indicators and benchmarks and promoting dialogue with local and international development agencies. Member organizations of the International Federation on Ageing are involved in and employ a wide range of participatory methodologies at local, national and international levels in their advocacy work and evaluation, planning and developing future programmes. The methods used include in-depth face-to-face interviews, participatory appraisals, exploring visions of the community followed by scenario planning, community audits, senior mentorship and large-scale national consultations in conjunction with Governments, industry and other national non-governmental organizations.

24. There remains a need for more and better communication among various entities within the United Nations Secretariat, the regional commissions, headquarters offices of United Nations programmes and specialized agencies and United Nations country teams. An important objective is to promote interaction within and between regions and subregions so that experiences, lessons and good practices can be shared. Consideration should be given to how the United Nations system can become more proactive in working together and with Governments and non-governmental organizations. The Department of Economic and Social Affairs programme on ageing could work as a clearing house of information and promote the sharing of experiences throughout the United Nations system and among Governments and non-governmental organizations. **The Commission may wish to ask the Secretariat to work with the United Nations system and other interested parties to coordinate efforts in identifying support that could be provided to Governments, upon their request, to undertake a participatory review and appraisal of the implementation of the Madrid Plan of Action.**

C. Regional-level review and appraisal

25. The bottom-up approach envisages that the findings of national reviews and appraisals will be consolidated at the regional level through the United Nations regional commissions. This exercise will be undertaken in connection with the review and appraisal of regional implementation strategies for the Madrid Plan of Action. Currently, such strategies are available and being implemented in the Economic Commission for Europe, the Economic and Social Commission for Asia and the Pacific and the Economic Commission for Latin America and the Caribbean regions. While the Economic Commission for Africa has not elaborated a regional implementation strategy, the African Union Policy Framework and Plan of Action on Ageing was adopted by African Union heads of State and Government in Durban, South Africa, in July 2002. Similarly, in the Western Asia region, the Arab

Plan of Action on Ageing to the Year 2012 was adopted during the Arab preparatory meeting for the Second World Assembly on Ageing, which was held in Beirut in February 2002. Both the Economic Commission for Africa and the Economic and Social Commission for Western Asia regional documents are conceptually and operationally closely related to the Madrid Plan of Action. At the same time, all regional policy documents on ageing differ in terms of priorities for action.

26. Because of the existence of regional implementation strategies or analogous regional documents on ageing in all the regions and because countries in the same region may share similar situations and priorities, it is considered most relevant for countries to share information, experiences and good practices, promote South-South cooperation and draw conclusions and set priorities for future cooperation and technical assistance primarily at regional-level review and appraisal exercises organized by the regional commissions. It is expected that the regional commissions will elaborate concrete plans for conducting the review and appraisal exercises. The format of the regional reviews and appraisals may vary from region to region and would include various events such as conferences, workshops, meetings of experts and seminars.

27. The Economic Commission for Africa, as coordinator of United Nations activities on ageing in the region, plans to apply its experience in review and appraisal of the implementation of the major international policy frameworks towards monitoring the implementation of the Madrid Plan of Action. The Commission envisages the convening of working groups of experts and the organization of a conference of major stakeholders as appropriate formats for review and appraisal. The working groups may be composed of multisectoral and multidisciplinary experts and the conference of stakeholders may include international stakeholders and ministers with responsibility for economic development and finance, social welfare, gender and health. The Commission would also look forward to carrying out a survey of Member States that would focus on identifying best practices in policy development on ageing in the region.

28. Following the signing of a memorandum of understanding between the Economic Commission for Europe and the Government of Austria, the Vienna-based European Centre for Social Welfare Policy and Research will assist the secretariat of the Commission in the implementation and monitoring of the regional strategy. The primary task of the European Centre is to help clarify the modalities and procedures for regional monitoring, review and appraisal. This includes developing indicators linked to the commitments of the Commission's ECE implementation strategy. The Commission has received three requests from Member States to conduct training workshops and assist in national capacity-building on review and appraisal. The Commission is considering publishing a report that would be based on demographic data and information from national reports on ageing, including participatory findings, as available.

29. The Economic Commission for Latin America and the Caribbean sees the regional review and appraisal as a series of different activities culminating at a regional event during its annual session. Activities under consideration include organizing subregional seminars and meetings of experts, conducting studies on the interrelationship between ageing, family and public policy, designing future scenarios for ageing societies, including impact assessment of policy interventions,

and updating a data bank for regular demographic monitoring of population ageing in Latin America and the Caribbean.

30. Latin American and Caribbean countries will meet in the framework of the Ad Hoc Committee on Population and Development during the periodic session of the Economic Commission for Latin America and the Caribbean, to be held in Montevideo in March 2006, and will discuss the follow-up activities of the regional process of implementation and review and appraisal of the Madrid Plan of Action, including the convening of the regional conference of the five-year review of the implementation of the Madrid Plan of Action.

31. During the Economic and Social Commission for Asia and the Pacific seminar in Macao, China, in 2004, several participants expressed their strong support for a high-level event as the region's input to the global review and appraisal, as reflected in the recommendations of the seminar. In addition to the high-level segment, a working-level segment could explore one of the issues of regional priority, such as the funding requirements for the care of older persons. The Commission has indicated that the Government of Macao has offered to host a regional review conference in September 2006.

32. The Economic and Social Commission for Western Asia foresees organizing a regional meeting to consider national review and appraisal reports. A political declaration on ageing and a comprehensive report could be the results of such a meeting. The ability to convene such a meeting depends on the availability of additional resources. An alternative would be to address a specialized questionnaire regarding national review and appraisal to Governments and non-governmental organizations.

33. It must be reiterated that the provision of support for national action for review and appraisal and for the holding of regional events to conclude the regional segment of the process requires substantial financial resources. Those resources are not currently available in the regular budgets of the regional commissions and would most likely be sought from extrabudgetary contributions from interested Governments. **The Commission may wish to request the regional commissions to identify appropriate modalities for conducting the regional review and appraisal and call upon interested Governments to offer support and assistance, including financial contributions, to support national action and the convening of regional review and appraisal activities and events during 2006 and 2007.**

III. Proposed calendar for the first cycle of the review and appraisal

34. The participatory review and appraisal should be viewed as an ongoing process that will occasionally report to regional and global levels. While the review and appraisal exercise is not time-bound, it is important to set the target year for consolidating the findings at the global level. The target year of 2007 is important, as it marks five years since the Second World Assembly on Ageing was convened in Madrid and, since there has not been a regional or a global review on ageing since 1997, it would also close a 10-year gap in assessing the situation of the world's older persons and international action on ageing. At the same time, however, a great

deal of preparatory work remains to be done, at all levels, to make the bottom-up participatory review and appraisal meaningful. Therefore, a series of activities is proposed in the calendar that follows, highlighted by a global review of the world ageing situation during the forty-fifth session of the Commission for Social Development in 2007 and a global review and appraisal of the implementation of the Madrid Plan of Action during the forty-sixth session of the Commission in 2008. The tentative calendar for the first cycle of the global review and appraisal of the Madrid Plan of Action is proposed as follows:

2006

(a) The Commission for Social Development decides on the timing, modalities and theme for the first cycle of the review and appraisal;

(b) Member States receive practical guidelines for the review and appraisal of the Madrid Plan of Action prepared by the Department of Economic and Social Affairs in consultation with the regional commissions and programmes and agencies of the United Nations system. As a first step, Member States will indicate their priorities for review and appraisal and undertake an "instrumental" assessment, including identifying laws and implementing regulations, institutions, policies and programmes introduced or altered since 2002 in response to the Madrid Plan of Action. Countries will also recall national priorities and review the national ageing situation. As a result, each country will have identified for itself specific areas for in-depth participatory inquiries using the bottom-up approach. They would present this information to the Commission for Social Development in 2007;

(c) The Department of Economic and Social Affairs and the United Nations system will work jointly to promote awareness of the bottom-up approach and familiarity with the guidelines, to assist countries in beginning the process;

(d) Regional commissions, at their governing bodies, will undertake an initial regional assessment of the ageing situation based on country reports on the accomplishments of national plans of action on ageing and submit their findings to the Department of Economic and Social Affairs for inclusion in a report of the Secretary-General to the Commission for Social Development;

2007

(a) The Commission for Social Development will mark the fifth anniversary of the Second World Assembly on Ageing. The Secretary-General will submit to the Commission a report on major developments in the area of ageing since the Second World Assembly (report on the world ageing situation), which could include short regional contributions (regional ageing situations) by the regional commissions. Member States will inform the Commission about the actions they have taken since the Second World Assembly to implement the Madrid Plan of Action (for example, new laws, policies and programmes, the establishment of coordinating mechanisms and information campaigns) and exchange information on which area each country will determine for itself to evaluate using a bottom-up participatory approach;

(b) National and regional processes of review and appraisal will begin. Countries will review and appraise the national policies and strategies that they identified. Information on the initial experience and good practices in organizing

and conducting bottom-up participatory evaluation at the local and national levels will also be collected, analysed and presented to the regional commissions;

(c) Upon request, the regional commissions, in cooperation with other entities, will assist countries in conducting their national review and appraisals and encourage participatory approaches to the process;

(d) Regional commissions will convene regional conferences (pending the availability of sufficient resources) to consider the findings of national reviews, share experiences and good practices and identify priorities for future action. The commissions will submit the conclusions of the meetings and individual national reports to the Commission for Social Development in 2008;

2008

The Commission for Social Development, at its forty-sixth session in February 2008, will conduct the global segment of the first cycle of the review and appraisal of the Madrid Plan of Action. The modalities of this segment could include a series of plenary meetings or deliberations of a series of round tables. An outcome document could include the conclusions of the first review and appraisal exercise along with the identification of prevalent and emerging issues and related policy options. A series of parallel events, including panels, workshops and seminars organized by all major stakeholders will be conducted, including the presentation of findings of independent monitoring projects.

35. **The Commission may wish to endorse the proposed calendar for the first cycle of review and appraisal of the Madrid Plan of Action. It may also wish to invite Governments to undertake an initial identification of actions they have taken since the Second World Assembly on Ageing, with the aim of presenting this information to the Commission at its forty-fifth session in 2007, so that each country may establish for itself the action or activity it intends to review utilizing a bottom-up participatory approach. The Commission may also wish to request the Secretary-General to submit to the Commission at its forty-fifth session in 2007, a report on major developments in the area of ageing since the Second World Assembly (the report on the world ageing situation), which could include short regional contributions (regional ageing situations) by the regional commissions.**

36 The global segment of the first cycle of the review and appraisal at the forty-sixth session of the Commission would provide opportunities for assessing progress in the implementation of the Madrid Plan of Action at the national and regional levels, identifying achievements and obstacles in the implementation process, exchanging experiences and good practices, analysing international cooperation on ageing and selecting priorities for the next cycle of the implementation process. Participants would include representatives of Member States and representatives of all other major stakeholders. **The Commission may wish to recommend that the format of the concluding event include, along with a plenary debate, a series of panel discussions and parallel events related to the theme of the first review and appraisal cycle.**

37. Thus the review and appraisal of the Madrid Plan of Action would consist of a spectrum of events at the local, national, regional and international levels and would extend over a period of several years, from 2006 to 2008. These events may be of a

substantive, promotional or practical nature and include research projects, conferences, media campaigns and reports and other publications that would contribute to the exploration of the central theme selected for the review cycle (see section IV below). The involvement of all major stakeholders, including Member States, organizations, programmes and specialized agencies of the United Nations system, non-governmental organizations and the private sector, is indispensable. All stakeholders may choose to organize and/or sponsor international events related to the central theme. **The Commission may wish to invite all major stakeholders to participate in the process of the review and appraisal and contribute to its various activities and events.**

38. A major aspect of the road map for the implementation of the Madrid Plan of Action involves mainstreaming the issue of ageing and the concerns of older persons into national and international development plans and strategies. It is therefore important to evaluate the extent and the success of mainstreaming efforts. **The Commission for Social Development may wish to recommend to the Economic and Social Council the integration of the issue of ageing into the monitoring, review and appraisal exercises of other major international development initiatives and policy frameworks, including the Millennium Declaration, the Programme of Action of the International Conference on Population and Development, the Copenhagen Declaration on Social Development and the Programme of Action of the World Summit for Social Development and the Beijing Platform for Action and their follow-up processes.**

IV. Proposed theme for the first cycle of the review and appraisal

39. To spearhead the review and appraisal exercise at all levels — local, national, regional and global — the Commission for Social Development recognized the importance of choosing a specific theme emanating from the Madrid Plan of Action. The following suggested themes were received from Governments in response to the note verbale of the Secretary-General: "Towards an ageing friendly society"; "Social protection and care for dependent persons"; "Promotion of health, functional capacity and well-being throughout life"; "The role of older persons in society of the twenty-first century"; "The role of the State in the creation of conditions for the social security of older persons"; and "Participation of older persons in development".

40. Discussions during the interregional consultation organized by the secretariat produced the following suggested themes: "Improving the life quality of older persons"; "Empowerment for sustainable engagement"; "Successful adjustment to an ageing world"; "Active ageing in place"; and "Meeting the challenges of an ageing world".

41. In considering these suggestions, Governments are invited to take into account the decision of the Commission for Social Development to organize the review and appraisal of the implementation of the Madrid Plan of Action on a five-year cycle. The theme for the review and appraisal, while linked to the priority directions of the Madrid Plan of Action, should be broad enough to encompass all three of its priority directions, in order to avoid a situation in which any one of the directions is not considered during a particular review cycle. In this connection, it is suggested that

the theme should be cross-cutting in nature. **Therefore, following an analysis of the opinions expressed by several Member States, focal points on ageing of the United Nations system and non-governmental organizations, it is suggested that the Commission for Social Development consider the following theme for the first review and appraisal cycle of the implementation of the Madrid Plan of Action: "Adjusting to an ageing world".**